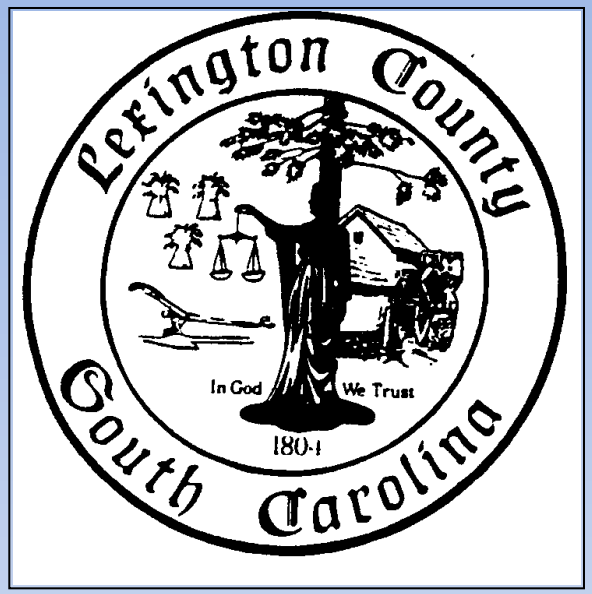

It's All About the Specifications

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A little about me…

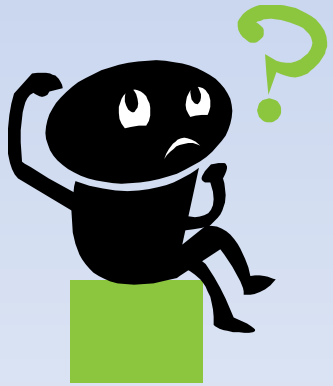
- *Originally from western Massachusetts. I have lived in South Carolina for 7 years.*
- *Mom of four children ages from 6 months to 18 years old*
- *I have been in the Procurement world for seven years.*
- *Started at the University of South Carolina procuring items for the department of Psychology in 2005.*
- *Procurement Officer for Lexington County for five years.*

Introduction

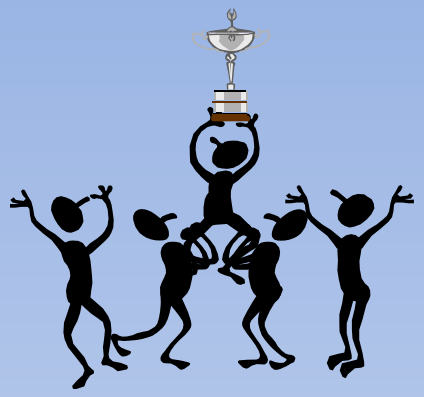
The goal of Purchasing is to provide the end user with the determined goal that is necessary to meet the end user's requirements, based on the historical, budgetary, legal requirements of the organization and the most important tool is the preparation of the specifications.

The 4 “W”s and 1 “H”

- WHAT is the department’s necessity?
- WHEN do I really need it by?
- WHERE can I find help writing the specifications?
- WHO is responsible for WHAT?
- HOW much is in my budget?



And the answer is…



WHAT is the your necessity?

Answer – Discuss the expected results the end users.

WHEN do I really need it by?

Answer – Planning is essential to the project's success.

WHERE can I find help writing the specifications?

Answer – Networking through NIGP (National Institute for Governmental Purchasing) or SCAGPO (South Carolina Association for Government Purchasing Officials). All else fails just Google!

WHO is responsible for WHAT?

Answer – It's all about TEAMWORK! Everyone should be knowledgeable for their part.

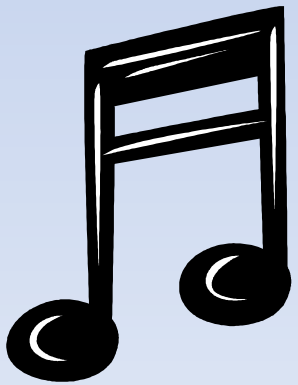
HOW much is in my budget?

Answer – Everything comes down to budget!

It’s Not Just A Song!

“No, you can't always get what you want. But if you try sometime, you just might find you get what you need”

- The Rolling Stones



Types of Scope/Specifications

A. Commodities, Equipment, Supplies and Construction

1. Simple or Complex Requirements
2. Brand Name Specifications
3. Qualified Products Lists
4. Design Specifications
5. Performance Specifications
6. Combination Design/Performance Specifications

B. Professional Services

1. Analyzing Job Requirements
2. Minimum Documents Requirements
3. Pre and Post Bidders Meeting
4. Performance Evaluation
5. Specification Development/Analysis Groups
6. Evaluation Criteria
7. Special Provisions
8. Documentation

TYPES OF SPECIFICATIONS

Design: The connotation here for the word “design“ means that the specification is so detailed that it describes how the product is to be manufactured.(buildings, highways etc.)

Performance: As the name indicates, these specifications set out the performance requirements that a product is to meet. Using this concept, the end result is the priority consideration and, in contrast to the design approach, the manufacturer is given great latitude in how can accomplish it. This encourages ingenuity, innovation, and cost reduction.

Combination: Specifications can, and often do, include both design and performance features. Characteristics of both are used as prerequisites and as limiting factors in developing the specifications

Brand Name: Cite a brand name, a model number, or some other designation that identifies a specific product of a manufacturer as an example of the quality level desired. Items equaling or surpassing this quality level are understood to be acceptable. Although brand name specifications are not considered good specifications, they have a legitimate though limited place in public purchasing.

Qualified Products List: This is to determine, in advance, those products which are acceptable. The evaluation of these bids is greatly simplified, and the price and the performance capability of the bidder become the determinants.

Samples: Samples can also be of great value in assuring compliance and satisfaction after award, but before production. In this way, many problems can be solved before the units are manufactured and delivered.

BE CAREFUL!

Don't get too restrictive with your specifications

1. A restrictive specification usually limits competition and eliminates items that can satisfactorily meet actual needs.
2. Specification writers should be careful not to use "in house" jargon and acronyms that may be misunderstood by the bidder.
3. Specifications must be well written and communicative.
4. A well-written specification is precise in its descriptions and directions. It should be clear, simple language, free of vague terms of those subject to variation in interpretation.
5. Abbreviations should be restricted to those in common usage and not subject to possible misunderstanding.
6. A good specification writer seeks the advice, assistance and cooperation of all intended uses concerning their precise requirements regarding the standards of quality, type, size, etc. for any item(s). Always seek the assistance of individuals, who have specialized technical competence in the field for which you are developing the specifications.

WHAT A GOOD SPECIFICATION SHOULD BE

1. Simple, consistent and exact, but not so specific that a loophole will allow a bidder to evade any of the provisions and thereby take advantage of his competitors or the buyer.
2. Identified, when possible, with some brand specification already on the market. (Custom goods are expensive).
3. Capable of being checked. It should describe the method of checking which will govern acceptance or rejection. A specification which cannot be checked is of little value and only confusion will result.
4. Reasonable in its tolerance. Unnecessary precision is expensive.
5. As fair to the seller as possible.
6. Capable of being met by several bidders for the sake of competition.
7. Clear and Up-to-Date. Misunderstanding can be expensive.
8. Flexible, inflexible specifications defeat progress. Invite vendors to suggest cost saving alternatives or substitutes.

KEY WORDS

The inappropriate use of key words in your specification could have disastrous results if the supplier is not sure what you are requiring and what you would like to have. Remember, suppliers, in order to be competitive, will almost always provide the least expensive product to you. If you say “may” rather than “will” in the text of your specification, it could mean one thing to one supplier and another to the end user.

-***Use “shall” or “will” where ever a specification expresses a requirement.***

-***Use “should” or “may” to express non-mandatory provisions.***

EVERY SPECIFICATION WRITER SHOULD ASK QUESTIONS OF THEMSELVES!

- What vendor will be receiving the document?
- What do I want people to know or do?
- What should be my tone or approach?
- How detailed and exact should my information be?
- What can I assume about my audience's knowledge of the subject?
- What might their questions be?
  - ***Expect the Unexpected!***

A PRE-WRITING CHECKLIST IS ESSENTIAL

1. Revision or new specification if necessary.
2. Determine what information is needed.
3. Determine information sources and resources.
4. Review existing related specifications and it's standards(internal and other sources).
5. Brainstorm the proposed content with your peers.
6. Develop a conceptual specification in your mind.
7. Interview personnel in other affected departments.
8. Have a information session with vendors prior to developing specifications.
9. Other revisions necessary.
10. Within statutory and policy limits.
11. Conflict information.
12. Detailed flow chart necessary.
13. Who is your audience?
14. Do you have the data to inform them?

Let's Get GREEN!

- **Settle on green selection criteria prior to writing specifications.**
- **Test or get information on how stuff works. (Does it work well?)**
- **Check with other government entities.**
- **Evaluate total cost, not just the purchase price.**

Helpful Links

SCAGPO – www.scagpo.gov

NIGP – www.nigp.org

State of South Carolina

http://procurement.sc.gov/PS/PS-index.phtm

QUESTIONS?